

“California Grown” 2002/2003 Research Overview



Be Californian **Buy California Grown**SM



Research Overview

◆ Consumer Tracking Survey

- Surveying consumers to measure awareness and movement against benchmarks

◆ Diagnostic Concept Test

- Measuring communications effectiveness of the two English-language campaigns



Tracking Study

◆ Objectives

- Update benchmarks
- Measure consumer recall of campaign and main messages
- Evaluate impact of commercials on consumer behavior



Tracking Study

◆ Methodology

- 1,000 consumers surveyed statewide
- Primary household shoppers
- 25 -54



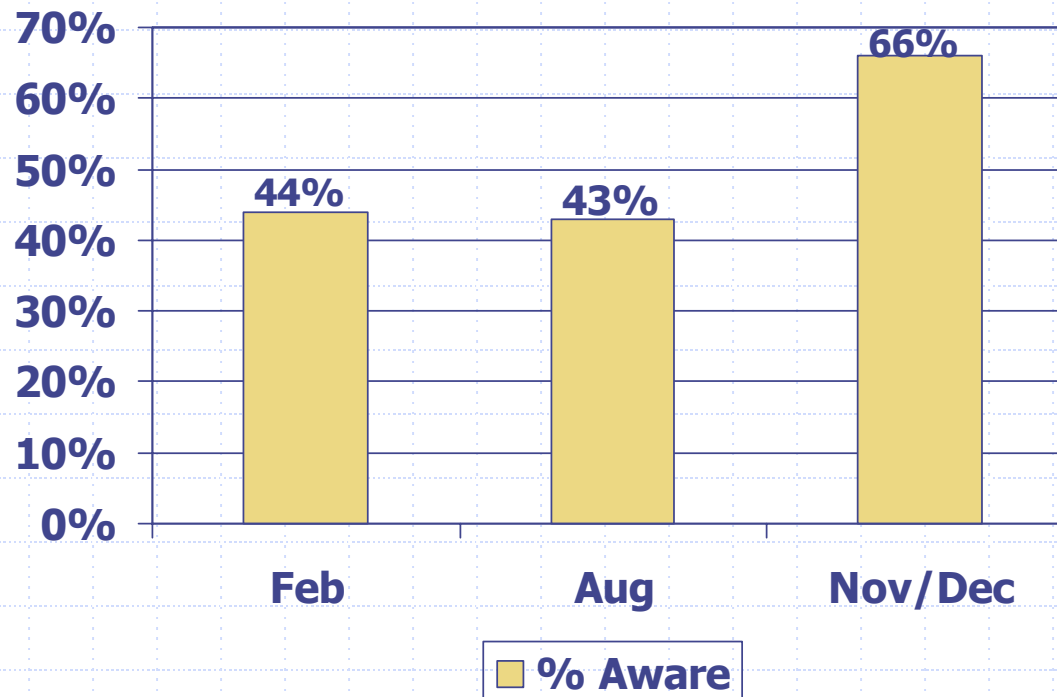
Tracking Study

- ◆ Benchmark study conducted in February/March 2002 by Rose Research
- ◆ Additional pre-launch survey August 2002 by Ketchum Research

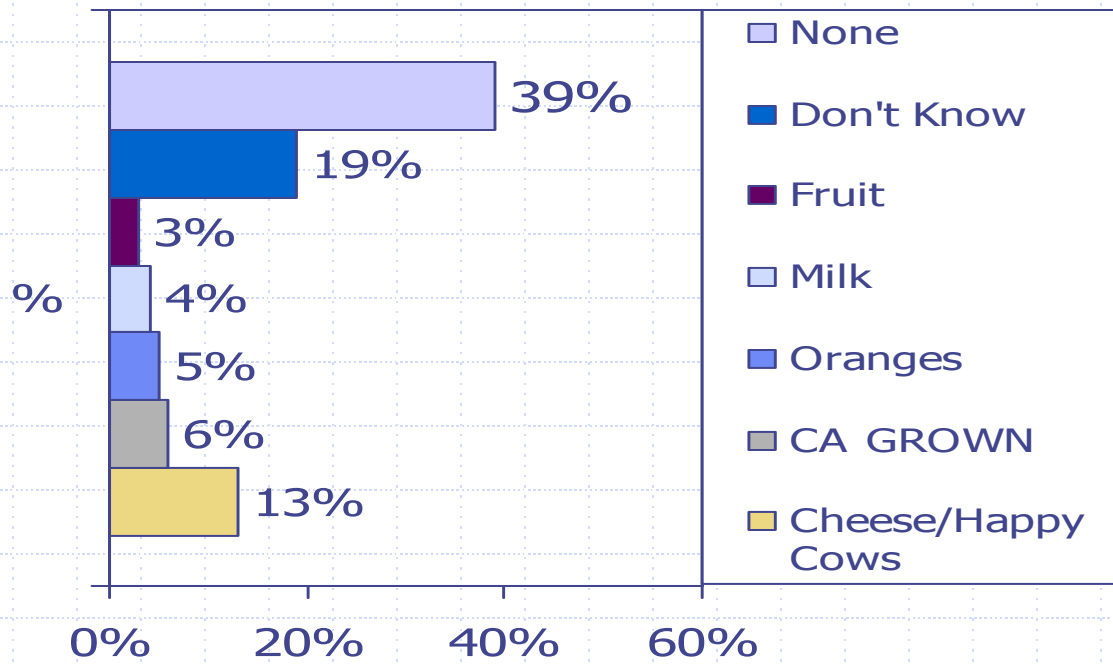


Tracking Study Results

- ◆ Awareness of advertising for California grown products (but not necessarily of "CA GROWN")



Tracking Study Results

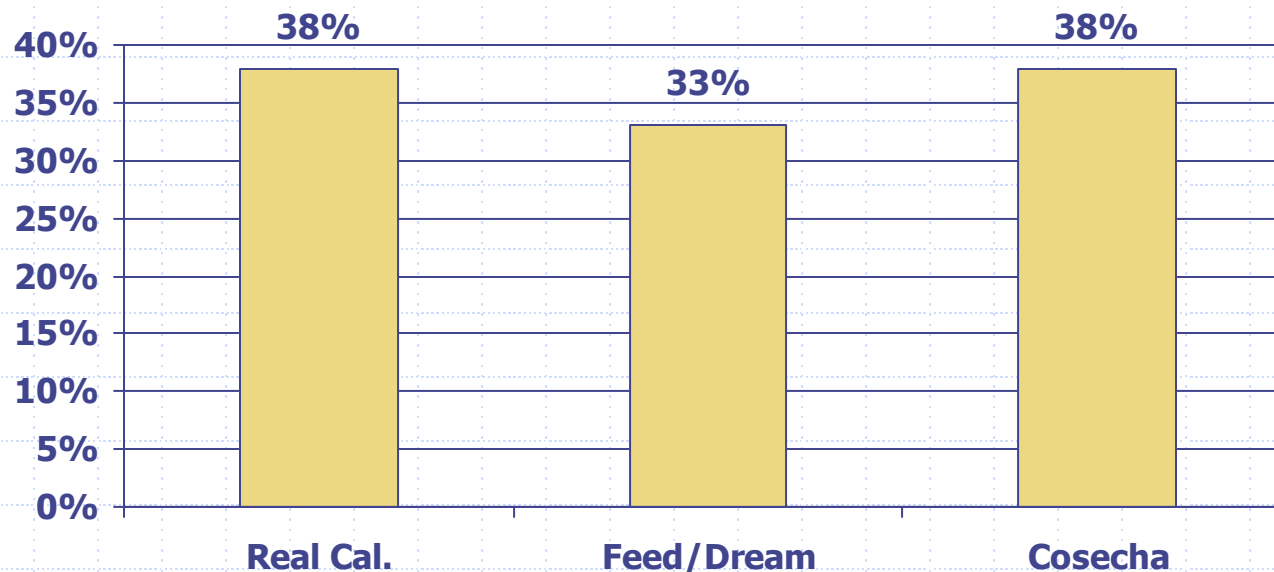


◆ What products do they remember being advertised? (unaided)



Tracking Study Results

- ◆ Specific Recall of "California Grown" Campaign (aided, by commercial)



Tracking Survey Results

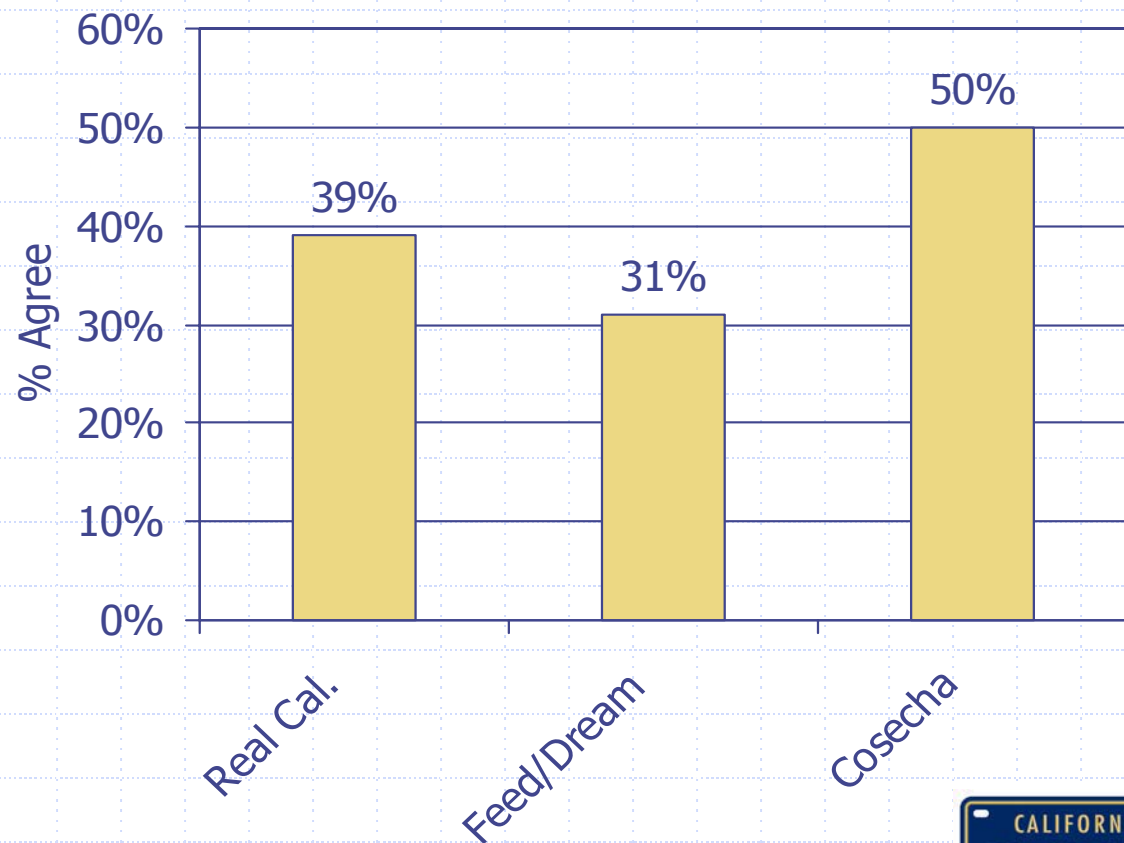
◆ Key Message Recall

- 30% (unaided) played back "buy California Grown Products" as main message
- Aided Awareness
 - ◆ Helps California, economy and farmers – 61%
 - ◆ Should support/be proud of California – 18%
 - ◆ Good, quality, fresh, healthy – 8%



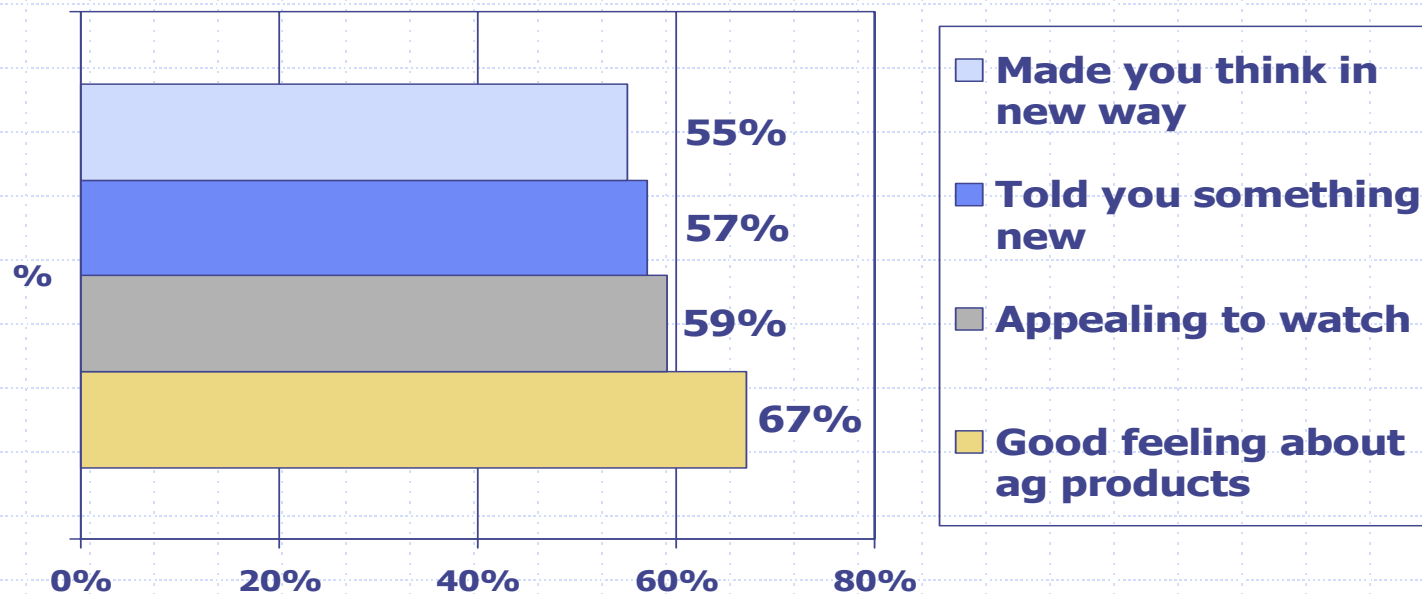
Tracking Study Results

- ◆ Importance of the main message, by commercial, among those aware



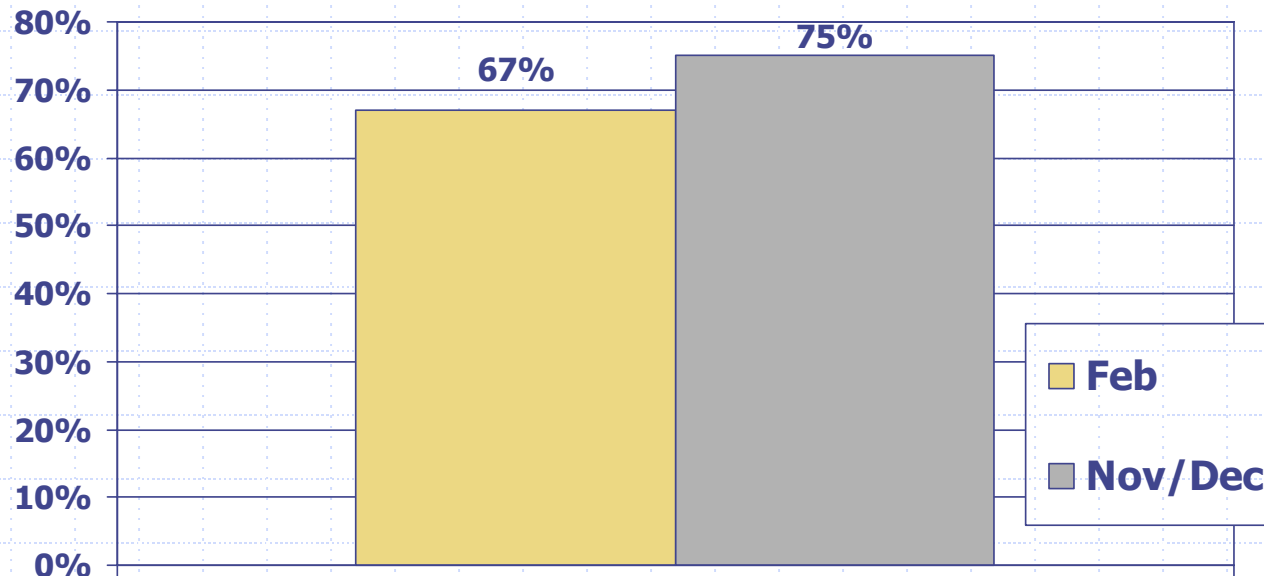
Tracking Study Results

- ◆ Other key findings, among those aware of the commercials



Tracking Survey Results

- ◆ Among all consumers, those who say they are more inclined to buy California agricultural products is up 8%

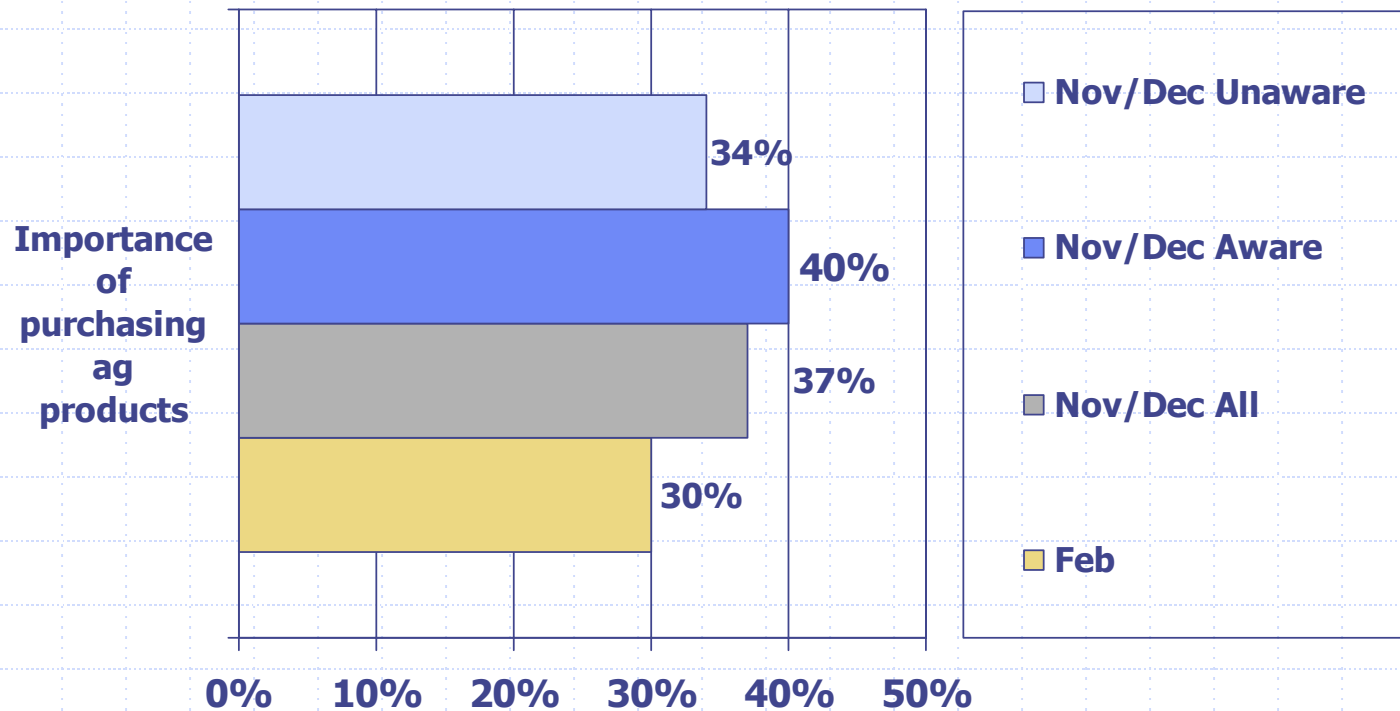


More inclined to buy Cal ag products



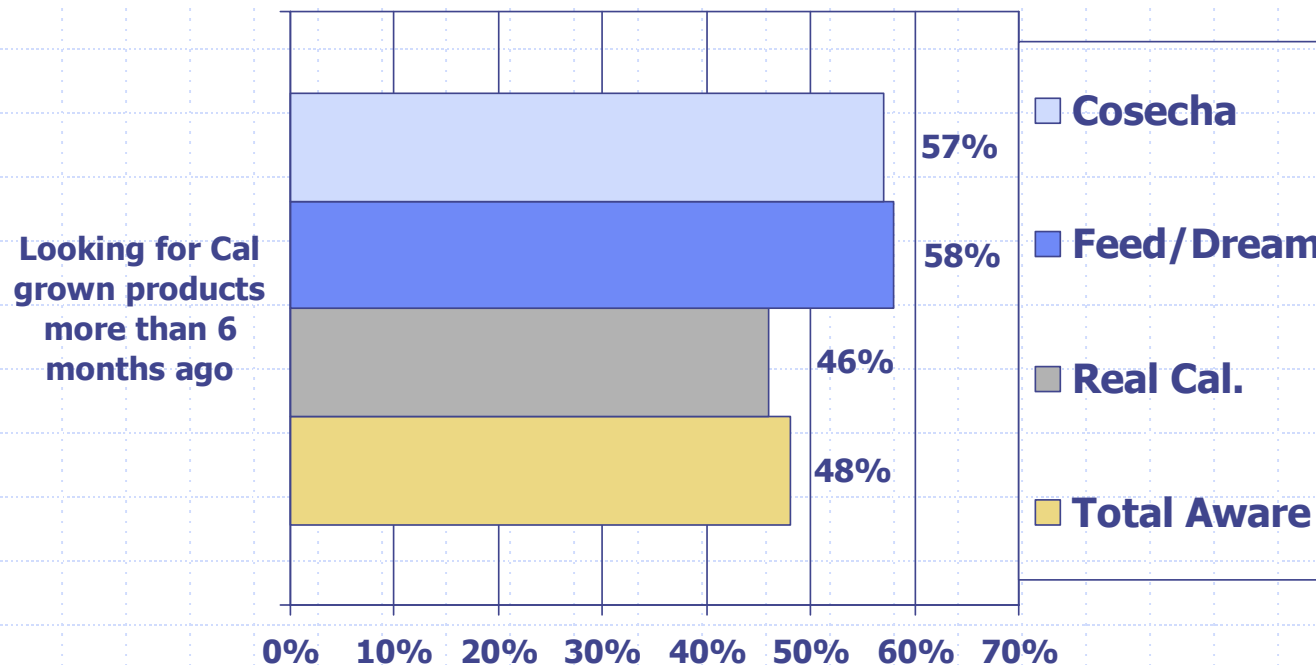
Tracking Survey Results

- ◆ Consumers who believe it is important to purchase California grown products is up 7% (10% among those aware of the commercials)



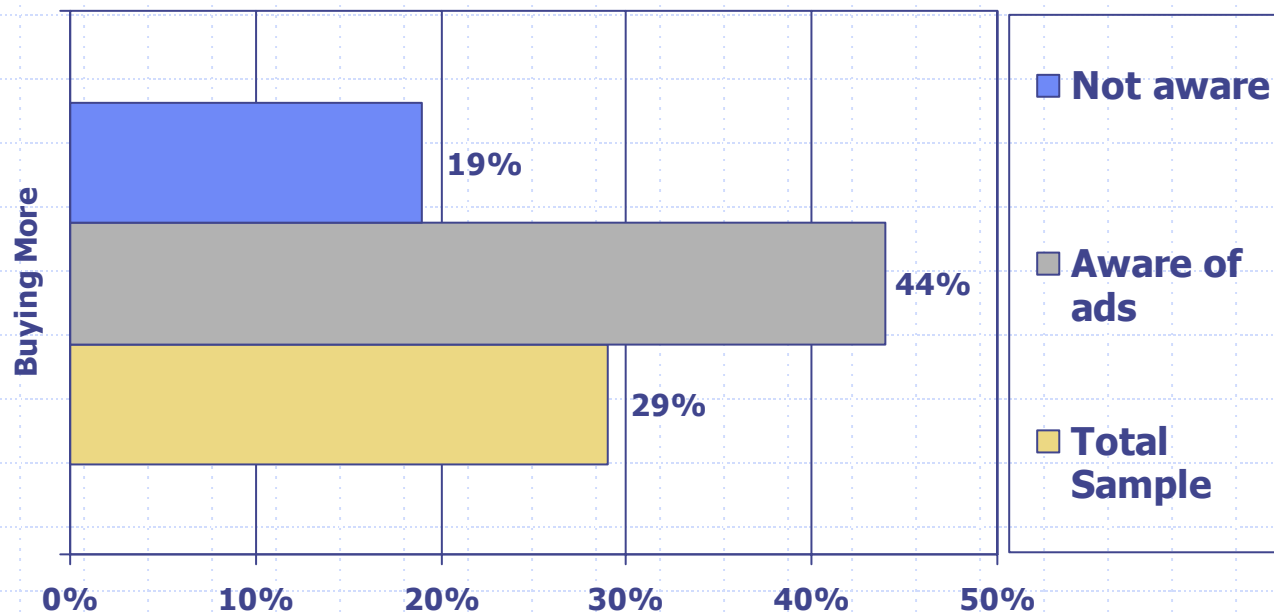
Tracking Survey Results

- ◆ 48% of consumers are looking for California grown products more than they were six months ago – higher among those aware of “Feed the Dream and “De Buena Cosecha”



Tracking Survey Results

- ◆ Those aware of the commercials are much more likely to be buying more California grown products than they were six months ago



Concept Test

◆ Objectives

- Compare communications effectiveness of “Feed the Dream” and “Real Californians” campaigns
- Determine effectiveness of each campaign in different markets (LA vs. Fresno/Bakersfield)
- Provide strategic guidance



Concept Test

◆ Methodology

- Mall intercept study
- 300 total interviews (150 each in LA and Fresno/Bakersfield)
- Half of each group exposed to each commercial or campaign (75 each in LA and Bakersfield)



Concept Test

◆ Normative Measures

- Commercials measured against norms for “new product introduction” campaigns
- Both campaigns consistently met or exceeded norms



Concept Test

	Real Californians	Feed the Dream	Norm
Percent saying the main idea is extremely or very important	69%	65%	60%
The main message is completely or very believable	91%	81%	70%
Likeability of the commercials	83%	81%	75%
"extremely" or "very" likely to buy after seeing the commercials	81%	82%	75%



Concept Test

- ◆ Differences between “Real Californians” and “Feed the Dream”
 - Directionally, “Real Californians” scored higher on key message delivery



Concept Test

Main message recalled (among all respondents in both markets)	Real Californians	Feed the Dream
Buying California products helps the state's economy and the state's farmers	77%	60%
We live in and should support/be proud of California	35%	17%
Commercials show's what's grown/diversity of products	6%	13%
Shows ordinary/diverse people or a variety of people	15%	2%
Good quality, fresher, healthier products	11%	20%



Concept Test

- ◆ Los Angeles vs. the Central Valley
 - Communications impact of each commercial in different markets varied



Concept Test

"Feed the Dream" Ratings (Top 2 Boxes)	LA	Fresno
Found the message to be very or extremely important	77%	53%
Found the message to be very or completely believable	87%	76%
Liked the commercial very much or somewhat	88%	75%
Said the commercial gave "a good feeling about California grown products"	85%	59%
Makes you think of California grown products in a new way	73%	48%
Makes you want to buy California grown products	84%	56%



Concept Test

"Real Californians" Ratings (Top 2 boxes)	LA	Fresno
Agrees that buying California grown products is a good way to support the economy	77%	88%
Found the message to be very or completely believable	95%	87%
Liked the commercial very much or somewhat	84%	83%
Found the message "easy to follow"	83%	81%
Said the commercial gave "a good feeling about California grown products"	77%	67%
Makes you feel proud to be from California	77%	61%
Makes you want to buy California grown products	72%	67%

